



CareWhen Training

CareWhen Configuration

CareWhen Configuration

Before importing or adding clients and caregivers in CareWhen, selecting your settings and configuration preferences are crucial to the smooth operation of CareWhen for your business.

**System
Defaults**

**Menu
Dropdowns**

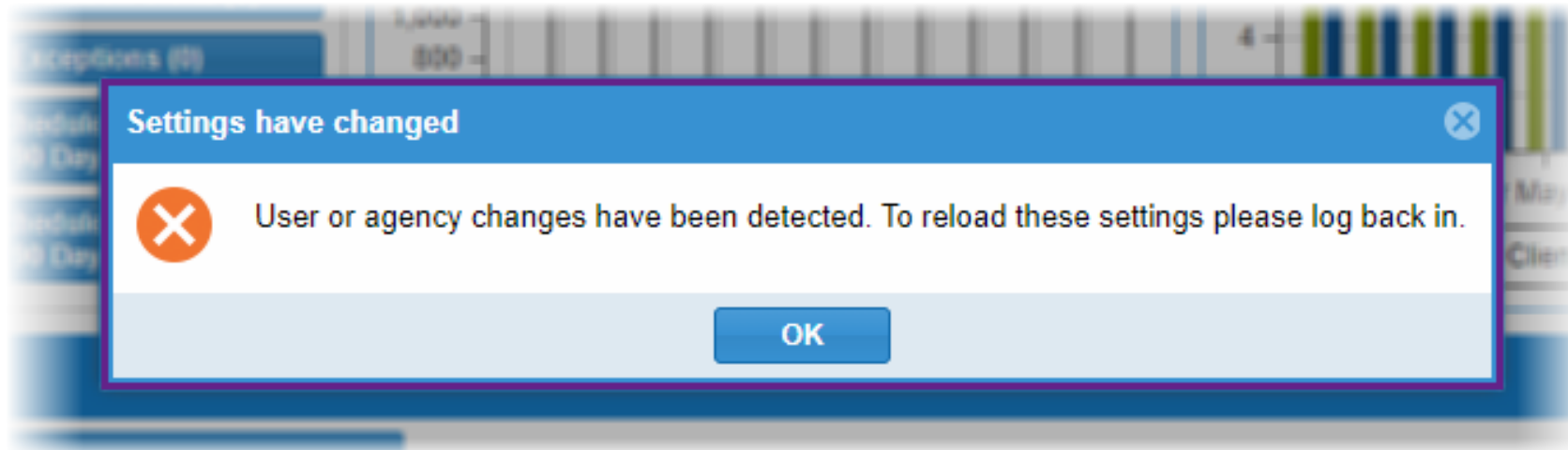
**Communication
Setup**

**User
Management**

**Clockwork /
EVV Setup**

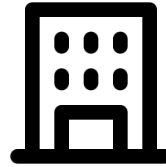
CareWhen Configuration

Note: Making changes to Configuration settings that alter input fields found throughout the site will prompt a Logout after your changes have been saved. When the prompt appears, click OK to log out and log back in.



System Defaults

System defaults control how CareWhen operates to reflect your business operations



Identify Agency offices & zones



Set up schedule and holiday settings



Configure overtime settings



Select fields to edit / show / hide

System Defaults



Primary & Additional Offices

Enter the Agency office information on the Primary Office tab under Agency Info. Additional office locations can be added on the Additional Offices tab.

Configuration Notes

- The email address entered will be used for customer service communications, as well as for billing information.
- The tax ID and last month of the fiscal year will be set up by AssuriCare

The screenshot displays the AssuriCare web application interface. The top navigation bar includes 'Home', 'Scheduler', 'Clients', 'Caregivers', 'Reports', 'Tasks', 'Messages', 'Settings', and 'Help'. The 'Settings' menu item is highlighted with a red circle and the number 1. The left sidebar shows a tree view of settings categories: Agency Settings, Maintenance, and Users & Roles. Under Agency Settings, 'Agency Info' is highlighted with a red circle and the number 2. The 'Agency Info' page has three tabs: 'Primary Office', 'Additional Offices', and 'Client Face Sheet'. The 'Primary Office' tab is active. The form contains the following fields: Company (AssuriCare), Address (100 5th Ave), Address 2, City (Waltham), State/Pr (Massachusetts), Postal Code (02451-8703), Email (alann@august-systems.com), and Comment. There is also a section for Phones with a table header: Prior..., Name, Number, Memo. Below the table, it says 'No phones found.' At the bottom, there are fields for Tax ID (99-9999999) and Last Month of Fiscal Year (December). A note at the bottom states '* Required.' and 'Call August Systems to update.'

System Defaults



Client Face Sheet

The Client Face Sheet allows Agencies to design and customize an information sheet on an individual client to provide to Agency staff or caregivers.

Configuration Notes

- Check off the fields that you would like to be included on the Client Information Sheet and click the save button
- The Name Format dropdown allows you to pick how you would like the client name to show on the Client Face Sheet

CareWhen? AssuriCare

Home Scheduler Clients Caregivers Reports Tasks Me 1 Settings Help

Agency Settings

- Agency Info 2
- Configuration
- Zones
- Client Types
- Field Setup
- Skill Levels
- Skill Type
- Text Messaging
- Agency Logo

Maintenance

- Agency Tables
- Charge Codes
- Payment Codes
- Adjustment Codes
- Education Codes
- Diagnosis Codes
- Note Types
- Type Of Service
- Discharge Reasons
- Document Categories
- GL Codes

Users & Roles

- Agency Roles
- Agency Users
- Doctors
- Referral Sources

Reminders

- Client
- Caregiver

Client Services

Agency Info

Primary Office Additional 3 Client Face Sheet

Name Format: Full Name 5

Client Id:

Address:

Phone Number:

Gender:

Birth Date:

Social Security:

Marital Status:

Admit Date:

Service Period:

Client Type:

Gender Preference:

Subscribers:

Primary Caregiver:

Special Needs:

Primary Doctor:

Diagnosis:

Contacts:

Directions:

Billing Id:

* required 🗝️ read only

System Defaults



Agency Configuration

The Agency Configuration tab sets some of the most basic settings for your Agency.

Configuration Notes

- *Disable Needs v. Skills* – when unchecked a warning generates if a caregiver does not have a skill that the client needs when assigning the visit
- *Keep Assignments* – when checked, visits scheduled during any entered unavailability for the caregiver show as a conflict
- *Skip Adjacent Visits* – when unchecked, the scheduler will receive a conflict alert for back to back visits for the caregiver
- *Enforce Unique Caregiver Email* – check your state Medicaid regulations if this should be enabled



AssuriCare Proprietary and Confidential

The screenshot shows the AssuriCare web application interface. At the top, there is a navigation bar with tabs: Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and '1'), and Help. Below the navigation bar is a sidebar menu with categories: Agency Settings, Agency Info, Configuration (highlighted with a red circle and '2'), Zones, Client Types, Field Setup, Skill Levels, Skill Type, Text Messaging, Agency Logo, and Maintenance. The main content area is titled 'Configuration' and has sub-tabs: Agency Configuration (highlighted with a red circle and '3'), Role Configuration, and Order Configuration. A red box highlights the 'Agency Configuration' section, which includes fields for Time Zone (set to UTC-06:00), Auto Client ID (checked, Next Number: 21), Auto Caregiver ID (checked, Next Number: 27), Term for Client (Client), Term for Staff (Caregiver), Term for Visit (Visit), Disable Needs vs Skills (unchecked), Keep Assignments (checked), Skip Adjacent Visit Check (unchecked), Default Area Code (727), Date Format (MM/DD/YYYY), Travel Time Code, Travel Mileage Code (29001 Mileage), Errand Mileage Code (29003 Errand Miles), Screen Caregiver Name (checked), Use Sales Tax (checked), Use Reduce By Minutes (checked), External Name Format (Full Name), Use Client Prospects (checked), Use Caregiver Prospects (unchecked), Review Visits (unchecked), Enforce Unique Caregiver Email (unchecked), and Address. Four purple callout boxes provide additional information: 1. 'Select the primary time zone for the agency and select whether you would like auto-generated Client and Caregiver IDs. Terms used to refer to Clients, Caregivers, and Visits can also be updated.' 2. 'The External Name Format controls how Client and Caregiver names will display on reports for HIPAA compliance. Select whether you would like to use Client and Caregiver prospects.' 3. 'In states where paper time sheets are still required, Review Visits enabled a "Review Needed" status that unlocks a new work flow for manually signing off on visits.' 4. 'Unless applicable, this should remain unchecked. If required, contact your AssuriCare representative for instructions on how to use this feature.'

System Defaults



Schedule Configuration

Schedule configuration is where you set the defaults for your schedule in CareWhen, including holidays, overtime, and display settings.

Configuration Notes

- Overtime Types contain three options:
 - Traditional OT is aggregated across *all* clients.
 - Agency OT is calculated on a client-by-client basis.
 - No OT disables Overtime in CareWhen.

Configuration

Agency Configuration | **Schedule Configuration** | Order Configuration | Reimbursement Settings

Week Start Day: Monday

Holiday Name	Date ↑	Starts	Ends	
New Year's Day	Mon 01/01/2018	12:00 AM	11:59 PM	✗
April Fools Day	Mon 04/01/2019	12:00 AM	11:59 PM	✗

Bill Holiday at 1.5x of regular charge:

Overtime Threshold/Day: 8

Overtime Threshold/Week: 40

Overtime Type: Traditional

Default Visit Start Time: 8:00 AM

Sch. Display Start Time: 7:00 AM

Sch. Display End Time: 11:30 PM

Sch. Use Stop Time:

Default Visit Duration: 04:00

Desired Hours Alt view:

Show Weekly Hours On Monthly:

* required 📄 read only

Callout 1: Settings menu item

Callout 2: Configuration menu item

Callout 3: Schedule Configuration sub-menu item

Callout 4: Agency Configuration sub-menu item

Callout 5: Agency Configuration sub-menu item

Callout 6: Overtime Type dropdown

Callout 7: Sch. Use Stop Time checkbox

Callout 8: Add new holiday icon

Callout 9: Calendar date selection (October 9, 2020)

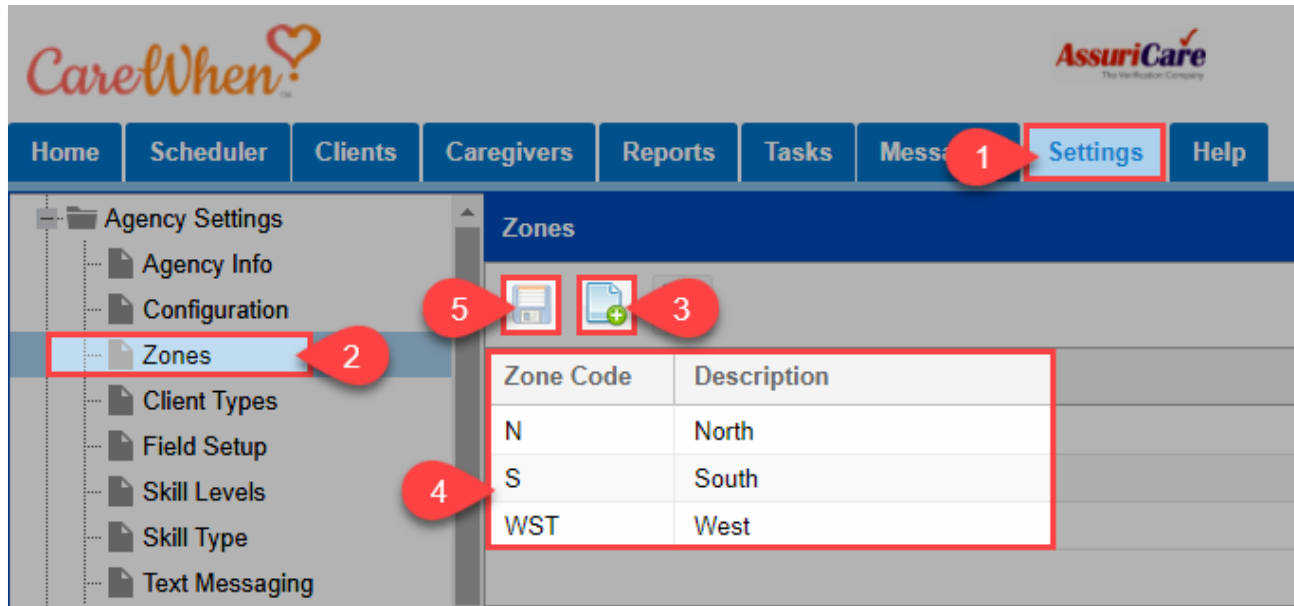
Callout 10: Select dates to add to the holiday table. The dates entered here will show in red on the schedule.

Callout 11: Enter schedule defaults. Use Stop Time will show both start and end times on the scheduler. Desired Hours Alt view will show Caregiver names in green if they are at or below their desired hours for a week, whereas Show Weekly Hours on Monthly will show the schedule daily hours and cumulative weekly hours for a Caregiver or Client when viewing in the monthly schedule.

System Defaults

Zones

Zones are defined by the Agency and are often either geographical areas or represent unique tax IDs if your Agency has multiple corporate entities. Clients are assigned to one zone, whereas caregivers are assigned to any zones that they will accept assignments within. This is used to help ensure schedulers do not assign a caregiver who is in not in the same zone as the client to the client's visit.



1

2

3

4

5

Zone Code	Description
N	North
S	South
WST	West

System Defaults



Client Types

Client Types are used to organize clients into certain groups that are used in Reporting.

Configuration Notes

- Client Types cannot be deleted after they have been used.
- Reports can be customized or filtered by client type.
- Common types include Private Duty, Medicaid, and LTCI.

The screenshot shows the CareWhen software interface. The top navigation bar includes 'Home', 'Scheduler', 'Clients', 'Caregivers', 'Reports', 'Tasks', 'Messages', 'Settings', and 'Help'. The 'Settings' menu item is highlighted with a red box and a callout '1'. The left sidebar shows a tree view with 'Client Types' selected, highlighted with a red box and callout '2'. The main content area is titled 'Client Types' and contains a table with the following data:

Client Type Code	Name
Private	Private Duty
Medicaid	Medicaid
LTC	Long Term Care

At the top of the main content area, there are two icons: a Save icon (callout '5') and an Add icon (callout '3'). The table is highlighted with a red box and callout '4'. A red callout '1' also points to the 'Messages' menu item.

System Defaults



Field Setup

Field Setup allows you to determine which fields on certain Caregiver and Client record tabs you would like to be editable, required, read only, or hidden.

Configuration Notes

- Fields marked as not used will not show on the tab or in any reports.
- Tool Tips show as hover hints to remind the user when completing those fields about what the field is used for.
- When making changes, consult with AssuriCare to ensure that no issues are caused from Field alterations.

Field Setup

Role: Caregiver Tab Location: Agency

Order	Field Name	Setting	Tool Tip
1	Agency Role	Required	
2	Limit By Zone	Available	
3	AIM Recipient	Available	
4	Disable AIM Messaging Notifica	Available	
5	Notify Release Notes	Available	
6	Signature Capture	Required	
		Read Only	
		Not Used	
		Available	
		Available	
		Available	
		Not Used	
13	Agency Custom 2	Not Used	
14	Agency Custom Date	Not Used	

Select whether you want to edit the fields on Caregiver or Client record tabs, then select the tab. For each field, you can enter a Tool Tip and determine whether the field is editable (Available), Required, Read Only, or hidden (Not Used).

System Defaults



Agency Logo

If desired, you can upload your Agency's logo to display in CareWhen.

Configuration Notes

- To add a logo, click Select Photo and select your logo from your computer files. Click Upload to save the logo in CareWhen.
- Note that the format must be jpeg or png.
- This will show on any manually generated invoices as well.

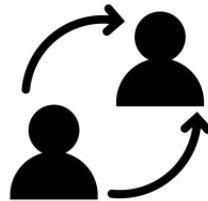
The screenshot shows the CareWhen web interface. At the top, there's a navigation bar with 'Home', 'Scheduler', 'Clients', 'Caregivers', 'Reports', 'Tasks', 'Messages', 'Settings', and 'Help'. The 'Settings' tab is highlighted with a red circle and the number 1. Below the navigation bar, there's a sidebar menu with 'Agency Settings' expanded, showing 'Agency Info', 'Configuration', 'Zones', 'Client Types', 'Field Setup', 'Skill Levels', 'Skill Type', 'Text Messaging', and 'Agency Logo'. 'Agency Logo' is highlighted with a red circle and the number 2. The main content area is titled 'Agency Logo' and features the AssuriCare logo. Below the logo, there's a text box with instructions: 'Instructions: File size limit is 2 mb. Height on banner resized to 30 pixels.' Below the instructions, there's a 'Photo File:' label, a text input field, and a 'Select photo' button. At the bottom of the form, there are 'Upload' and 'Reset' buttons. A red circle with the number 3 is placed over the 'Upload' and 'Reset' buttons.

Menu Dropdowns

You can customize the dropdown menus across the platform to reflect the common options that your business uses



Set user contact types



Manage referral source options



Curate cancellation and discharge options

Menu Dropdowns

Agency Tables: Contact Relationship

Various kinds of contacts can be saved in a Client or Caregiver's "Contacts Tab"; the Contact Relationship tab in Maintenance Settings allows you to enter in contact types that are available on those tabs.

For Example...

- Contact Relationship types can include Spouse, Care Monitor, Mother / Father, Son / Daughter, etc.

Save, Add, and Delete

Description	Active	
Spouse	✓	✗
Mother	✓	✗
Daughter	✓	✗
Son	✓	✗
Father	✓	✗
Neighbor	✓	✗

Tip: Drag & Drop to reorder.

Menu Dropdowns

Agency Tables: Cancellation Comments

Cancellation comments are required whenever a visit is cancelled. The Cancellation Comments table allows Agencies to manage the available comments associated with visit cancellation.

Configuration Notes

- Additional Cancellation Comments can be added from this table after setup.

The screenshot displays the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and '1'), and Help. The left sidebar shows a tree view of Agency Settings, with Agency Tables (highlighted with a red circle and '2') selected. The main content area shows the Agency Tables list, with Cancellation Comments (highlighted with a red circle and '3') selected. A table titled 'Save, Add, and Delete' is displayed, showing a list of cancellation comments with columns for Description, Active, and a delete icon. The table contains the following data:

Description	Active	
Hospitalized	✓	✗
Patient refused service	✓	✗
Patient not home	✓	✗
MD Appointment	✓	✗
Patient out of town	✓	✗
Patient has visiting family	✓	✗

A tip at the top right of the table reads: 'Tip: Drag & Drop to reorder.' A red circle and '4' points to the bottom of the table area.

Menu Dropdowns

Agency Tables: Referral Types

Agencies can track the type of referrals received through Referral Types, Company Types, and Referral Sources. Here you can add or edit current Referral Types.

Save, Add, and Delete

Tip: Drag & Drop to reorder.

Description	Active	
Doctors	✓	✗
Nursing Home	✓	✗

Configuration Notes

- Referral types is the broadest category for tracking referrals. Examples could include "Internet" or "Community Living."
- These can then be narrowed further by company type which might be "Internet -> Social Media" or "Community Living -> Assisted Living Facility"
- At the lowest level is the referral source, which might be "Internet -> Social Media -> Facebook" or "Community Living -> Assisted Living Facility -> Shady Pines."

Menu Dropdowns

Agency Tables: Company Types

Set the company-type designation options available when entering referral sources. These serve as a further narrowing down of the Referral Types category.

For Example...

- Company Types can include hospitals, assisted living facilities, social media, or radio stations.

1 Settings

2 Agency Tables

3 Company Types

4 Company Types

Save, Add, and Delete

Tip: Drag & Drop to reorder.

Description	Active
Home Care	<input checked="" type="checkbox"/>

Menu Dropdowns



Referral Sources

You can create a list of referral sources to track how clients or caregivers come to your Agency. The referral source will show on the client and caregiver records to tag each as to how they were referred (if applicable).

Configuration Notes

- Both Company Types and Referral Types need to be defined in the Agency Tables before adding a Referral Source
- An example of a referral source could be Sally Smith, a former caregiver.

Referral Sources

Search: Names, companies

Last Name	First Name	Referral Type	E...	Company	Phone
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New Referral Source

Personal Notes History

Referral Type:*

First Name: Middle: Last: Suffix: Credentials:

Company: Company Type:

Address:

Address 2:

City:

State/Pr: Postal Code:

Email:

Phones

Tip: dbl-click line item to edit phone. Drag & Drop to reorder.

Prior...	Name	Number	Memo
No phones found.			

* required

Save Save & Close Cancel

Menu Dropdowns



Agency Tables: Skills

Use the Skills tab to manage a list of various “skills” available to add on a Caregiver’s record. These skills will also show as “Needs” on a Client’s record. When checked on a Caregiver record, it indicates that the Caregiver can perform that skill. When checked on a Client’s record, it indicates that the Client needs someone who can perform that skill.

Configuration Notes

- If “Disable Skills v. Needs” is checked in the Agency Settings area, there will be no limitations on assigning Caregivers to Clients based on matching skills.

Save, Add, and Delete

Tip: Drag & Drop to reorder.

Description	Active
Dementia Care	✓
Diabetic Care	✓
Hoyer Lift	✓
Lifting	✓
Cats	✓
Dogs	✓
Live-In	✓
Smokes Inside	✓

Menu Dropdowns

Agency Tables: Termination Reasons

When removing a Caregiver from an Agency, the option will be available to leave a Termination Reason. Use the Termination Reason table to curate a list of selectable reasons.

For Example...

- Some examples of removal reasons include:
 - Non-Compliant
 - Quit without Notice
 - Violation of Policy
 - Quit with Notice

The screenshot shows the AssuriCare software interface. The top navigation bar includes Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and '1'), and Help. The left sidebar shows a tree view with 'Agency Tables' highlighted (circled in red with '2'). The main content area displays the 'Agency Tables' list, with 'Termination Reasons' selected (circled in red with '3'). A table titled 'Agency Tables' is shown with columns for Description, Active, and a delete icon. The table contains four rows: Non-Compliant, Quit without Notice, Violation of Policy, and Quit with Notice. A purple callout box labeled 'Save, Add, and Delete' points to the table's toolbar. A tip 'Tip: Drag & Drop to reorder.' is visible. A red circle with '4' points to the 'Termination Reasons' entry in the list.

Description	Active	
Non-Compliant	✓	✗
Quit without Notice	✓	✗
Violation of Policy	✓	✗
Quit with Notice	✓	✗

Menu Dropdowns



Discharge Reasons

The Discharge Reasons table contains approved discharge reasons that are used when a Client is *ending* service. Reasons can be added, edited, or deleted here.

Description	Code	Active	
Admitted to Hospital	2	✓	✗
Expired	20	✓	✗
Expired at Home	40	✓	✗
Expired Hospital, SNF, ICF	41	✓	✗
Expired Place Unknown	42	✓	✗
Left Against Advice	7	✓	✗
Routine Discharge	1	✓	✗
Still Patient	30	✓	✗
To Hospice - Home	50	✓	✗
To Hospice – Medical Facility	51	✓	✗

Menu Dropdowns

Agency Tables: Discharge Comments

Discharge comments are required whenever a Client is discharged. The Discharge Comments table allows Agencies to manage the available comments associated with Client discharge.

Configuration Notes

- Additional Discharge Comments can be added from this table after setup.

The screenshot displays the AssuriCare software interface. The top navigation bar includes tabs for Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and labeled '1'), and Help. The left sidebar shows a tree view of Agency Settings, with Agency Tables highlighted (labeled '2'). The main content area is titled 'Agency Tables' and lists various tables. 'Discharge Comments' is highlighted (labeled '3'). A table titled 'Save, Add, and Delete' is shown, containing two rows: 'Deceased' and 'Moved out of Service Area'. The table has columns for 'Description', 'Active', and a delete icon. A tip at the top right says 'Tip: Drag & Drop to reorder.' A red circle labeled '4' points to the 'Discharge Comments' table name.

Description	Active	
Deceased	✓	✗
Moved out of Service Area	✓	✗

Menu Dropdowns Optional Tables

In addition to the primary tables we recommend, you can customize these optional tables to provide drop downs for additional information on the Client and Caregiver records



Add Personal and Private information options



Set Client Disaster Priority



Manage Client Diagnosis Codes



Add language, religious preference, and ethnicity options

Menu Dropdowns (Optional)

Agency Tables: Advanced Directives

Items entered in the Advanced Directives table will be used from a Client's "Private" Tab to help designate preferred care. Items entered here also appear on the Client Record page.

For Example...

- Types of Advanced Directives could include:
 - POA
 - DNR
 - HealthCare Surrogate

The screenshot shows the AssuriCare software interface. The top navigation bar includes Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and '1'), and Help. The left sidebar shows a tree view of settings, with Agency Tables highlighted (circled in red with '2'). The main content area is titled 'Agency Tables' and lists various table types. 'Advanced Directives' is selected (circled in red with '3'). A 'Save, Add, and Delete' button is highlighted with a purple box. Below the list, a table displays the following data:

Description	Active	
Power of Attorney	✓	✗
Full Code	✓	✗
DNR	✓	✗
Living Will	✓	✗
Medical Power of Attorney	✓	✗

A tip at the top right of the table reads: 'Tip: Drag & Drop to reorder.' A red circle with '4' points to the 'Advanced Directives' table name in the list.

Menu Dropdowns (Optional)



Diagnosis Codes

Agencies can search ICD codes, published by CMS, and add them to the Diagnosis Codes table. The contents of this table are used in the dropdown list found on the Client record.

Configuration Notes

- The diagnosis description can be modified if desired.
- If preferred, an Agency may enter diagnosis free-form text description.

The screenshot displays the 'Diagnosis Codes' configuration page. The navigation menu includes Home, Scheduler, Clients, Caregivers, Reports, Tools, Messages, Settings, and Help. The 'Diagnosis Codes' table is shown with the following data:

DX Code	Description
E11.9	Type 2 diabetes mellitus without complications
I50.9	Heart failure, unspecified
J44.9	Chronic obstructive pulmonary disease, unspecified
N31.2	Flaccid neuropathic bladder, not elsewhere classified
Z46.6	Encounter for fitting and adjustment of urinary device
Z74.1	Need for assistance with personal care
Z74.2	Need for assist at home & no house memb able to render care
Z74.3	Need for continuous supervision
Z74.8	Other problems related to care provider dependency

Callouts in the image point to: 'Add and Edit' (1) above the table header, 'Search the table for existing Diagnosis Codes' (2) pointing to the search bar, 'Delete' (3) pointing to the delete icons in the table, and 'Settings' (4) pointing to the Settings menu item.

Menu Dropdowns (Optional)

Agency Tables: Client Priority

The Client Priority table is used by Agencies to classify disaster priority for Clients, as is required in some states. This is intended to prioritize those who need care the most.

Configuration Notes

- If an Agency had a Caregiver shortage due to a natural disaster, this would inform them which clients cannot go without help.

The screenshot shows the AssuriCare web application interface. The top navigation bar includes Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red circle and '1'), and Help. The left sidebar shows a tree view of settings, with Agency Tables highlighted (circled in red with '2'). The main content area is titled 'Agency Tables' and lists various tables. 'Client Priority' is selected (circled in red with '3'). A table titled 'Client Priority' is displayed with columns for Description, Active, and a checkbox. The table contains three rows: 'Priority 1 Must have care no other available' (Active), 'Priority 2 Other caregiver available in emergency' (Active, with a red 'X' in the checkbox), and 'Priority 3 Family in home w/notice will provide' (Active, with a red 'X' in the checkbox). A purple callout box labeled 'Save, Add, and Delete' points to the table's action icons. A tip 'Tip: Drag & Drop to reorder.' is visible. A red circle with '4' points to the 'Client Priority' table in the list.

Description	Active	
Priority 1 Must have care no other available	✓	
Priority 2 Other caregiver available in emergency	✓	✗
Priority 3 Family in home w/notice will provide	✓	✗

Menu Dropdowns (Optional)



Agency Tables: Counties

The Counties table allows you to set options available to use under a Client's "Personal Tab" when setting up or editing their information.

1

Settings

Agency Settings

- Agency Info
- Configuration
- Zones
- Client Types
- Field Setup
- Skill Levels
- Skill Type
- Text Messaging
- Agency Logo

Maintenance

- Agency Tables
- Charge Codes
- Payment Codes
- Adjustment Codes
- Education Codes
- Diagnosis Codes

Agency Tables

- Advanced Directives
- Cancellation Comments
- Care Plan Categories
- Client Priority
- Company Types
- Contact Relationship
- Counties
- Discharge Comments
- Ethnic Origin
- Languages
- Referral Types
- Religious Preferences
- Skills
- Termination Reasons

Save, Add, and Delete

Tip: Drag & Drop to reorder.

Description	Active
Kootenai	✓ ✕

2

3

4

Menu Dropdowns (Optional)



Agency Tables: Ethnic Origin

Use the Ethnic Origin tab to curate a list of available ethnicities to add to a Client or Caregiver's record.

The screenshot shows the AssuriCare Agency Tables interface. The top navigation bar includes Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red callout 1), and Help. The left navigation menu includes Agency Settings (Agency Info, Configuration, Zones, Client Types, Field Setup, Skill Levels, Skill Type, Text Messaging, Agency Logo) and Maintenance (Agency Tables (highlighted with a red callout 2), Charge Codes, Payment Codes, Adjustment Codes, Education Codes, Diagnosis Codes). The Agency Tables list includes Advanced Directives, Cancellation Comments, Care Plan Categories, Client Priority, Company Types, Contact Relationship, Counties, Discharge Comments, Ethnic Origin (highlighted with a red callout 3), Languages, Referral Types, Religious Preferences, Skills, and Termination Reasons. The Ethnic Origin table (highlighted with a red callout 4) has a header with Description, Active, and a checkbox. The table contains the following rows:

Description	Active	
African American	✓	✗
Hispanic	✓	✗
Native American	✓	✗
Chinese	✓	✗
Caucasian	✓	

A purple callout box labeled 'Save, Add, and Delete' points to the icons above the table. A tip reads 'Tip: Drag & Drop to reorder.'

Menu Dropdowns (Optional)



Agency Tables: Languages

Use the Languages tab to curate a list of available languages to add to a Client or Caregiver's record.

Save, Add, and Delete

Tip: Drag & Drop to reorder.

Description	Active	
German	✓	✗
English	✓	
Spanish	✓	✗
French	✓	✗
Russian	✓	✗
Vietnamese	✓	✗
Mandarin	✓	✗

Menu Dropdowns (Optional)

Agency Tables: Religious Preferences

Use the Religious Preferences tab to curate a list of available religions to add to a Clients record.

The screenshot shows the AssuriCare software interface. The top navigation bar includes Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (highlighted with a red callout '1'), and Help. The left sidebar shows a tree view of settings, with Agency Tables (highlighted with a red callout '2') selected under Maintenance. The main content area displays the Agency Tables list, with Religious Preferences (highlighted with a red callout '3') selected. The Religious Preferences table is shown with columns for Description, Active, and a delete icon. The table contains four rows: Catholic, Morman, Jewish, and Protestant. A purple callout '4' points to the table content. A purple callout points to the 'Save, Add, and Delete' icons at the top of the table. A tip reads: 'Tip: Drag & Drop to reorder.'

Description	Active	
Catholic	✓	✗
Morman	✓	✗
Jewish	✓	✗
Protestant	✓	✗

Communication Setup

Communication Setup controls how CareWhen communicates to clients, caregivers, and AssuriCare will operate



Create reminders for client tasks & caregiver tasks



Design document categories



Configure note types



Build default text messages for available visits

Communication Setup



Text Messaging

With CareWhen you can send text messages to caregivers to offer them visits. You can customize the text message language, as well as set forwarding schedules for replies to those messages to go to a specific Agency staff member by email. This page is also used to set Out of Office text responses that are sent to Caregivers attempting to communicate with an Agency after hours.

Configuration Notes

- The text message language saved here will become the default message, but when you send out individual messages you will have the option to change it for that individual.

The screenshot shows the 'Text Messaging' configuration page. The 'Message Settings' tab is selected. A callout box with a purple border and arrow points to the highlighted text in the 'Visit Accepted' field, stating: 'Do not delete the highlighted text. This will populate with the visit information when a text message is sent.' The 'Visit Accepted' field contains the text: 'Thank you for accepting %p @ %v.' The 'Visit Not Available' field contains the text: 'Visit is no longer available %p @ %v Thank you.' The left sidebar shows the navigation menu with 'Text Messaging' selected. Red callout numbers 1, 2, 3, and 4 point to the 'Settings' tab, the 'Text Messaging' menu item, the 'Message Settings' tab, and the text input fields respectively.

The screenshot shows the 'Text Messaging' configuration page with the 'Forward Email Schedule' tab selected. A table with columns 'From', 'To', 'Begins', 'Ends', 'Email Address', and 'Recur' is visible, but it contains the message 'No availability entries found.' An 'Add Forward Schedule' dialog box is open, showing fields for 'Start' (10/09/2020, 8:00 AM), 'End' (10/09/2020, 5:00 PM), a 'Recurrence' checkbox, and an 'Email Address' field. 'Add' and 'Cancel' buttons are at the bottom of the dialog. The left sidebar shows the navigation menu with 'Text Messaging' selected. Red callout numbers 1, 2, 3, 4, and 5 point to the 'Settings' tab, the 'Text Messaging' menu item, the 'Forward Email Schedule' tab, the 'Add' button icon, and the 'Add Forward Schedule' dialog box respectively.

Communication Setup



Client Reminders

Reminders can be created to follow up with clients for various reasons, such as a new prospect follow up, client birthday, or home visit.

Configuration Notes

- Reminders are added on the Reminders tab of the Client record and managed from the Quick Summaries area of the Scheduling tab
- Required reminders will automatically be created when entering in a new client
- Only users added to the “Alert Who?” field will receive the reminder

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Client

Code	Description	Active	Required
Birthday	Bday card reminder	✓	

3 +

4 Add New Reminder Definition

Code.*
Description.*
Alert Who?: None delegated
Days till warn:
Zones: All Zones
 Active Required Show on Census Report
* required

To add multiple names, click on each name to receive the reminder.

Add Cancel

Communication Setup



Caregiver Reminders

Reminders are also available for caregivers. Often reminders are used to remind caregivers about the renewal of certifications.

Configuration Notes

- Reminders are added on the Reminders tab of the Caregiver record and managed from the Quick Summaries area on the Scheduler tab
- Required reminders will automatically be created when entering in a new client
- Caregiver reminders can be set up with multiple steps. Steps refer to the number of reminders. For example, you could set up step one to send a 60-day reminder and step 2 to be a 30-day reminder.
- On the Setup tab, you can specify how the reminder will start and end.

Code	Description	#Steps	Active	Required
1	CPR Certification	1	✓	
2	Drivers license renewal	3	✓	✓

Opening Text:

The following reminder is due:

Closing Text:

Please comply with the request above. Contact your administrator with any questions.

* required 📄 read only

Communication Setup

Creating a Caregiver Reminder

Creating a caregiver reminder includes adding any necessary steps.

Sample reminder

Configuration Notes

- Caregiver reminders can be limited to a particular skill level
- When a reminder is entered on the Reminder tab of the Caregiver record, on the day specified the caregiver will receive the reminder with the opening and closing text defined in Setup and the memo inserted between.

Add New Reminder Definition

Code:* 4
Description:* CNA License Renewal
Alert Who?: Apple, Annie (COM)
Days till warn: 2
Zones: All Zones
Skill Levels: All Skill Levels, CNA
 Active Required

#	Reminder	Description
No steps found.		

* required

5 Add Cancel

Add New Reminder Step

Description: CNA License Due for Renewal
Memo to Insert: Your CNA license is due for renewal. Please send the office an updated copy of your license.
 Send Reminder Send Form

4 Add Cancel

Dear Annie,

The following reminder is due:

Due Date	Reminder
04/29/2020	Your CNA license is due for renewal. Please send the office an updated copy of your license.

Please comply with the request above immediately in order to continue to receive referrals. Please contact (555) 555 - 5555

Thank you,
Agency Administrator

Communication Setup



Note Types

Use the Note Types tab to add and edit customized notes pertaining to Agency needs such as “General”, “Compliment”, “Complaint”, “Prospect”, and “Emergency Preparedness”.

Configuration Notes

- Use the Allowed Roles column to control which Agency Roles can view each note type within CareWhen.

1 Settings

2 Note Types

3

Allowed roles dictate which type of Agency users can see certain note types.

Can Delete dictates which type of Agency users can delete the selected note types.

Name ↑	Code	Allowed Roles	Can Delete	Active	
Billing	BILL	Admin1, Default Admin, HR	Admin1, Default Admin	✓	
Client Request	CLIENT	Admin1, Default Admin, HR, Scheduler	Admin1, Default Admin	✓	
Complaint	COMP	Admin1, Default Admin, HR, Scheduler	Admin1, Default Admin	✓	
Compliment	KUDO	Admin1, Caregiver Limited View, Default Ad...	Admin1, Default Admin	✓	
Family Request	FAMILY	Admin1, Caregiver Limited View, Default Ad...	Admin1, Default Admin	✓	
General	GEN	Admin1, Caregiver Limited View, Default Ad...	Admin1, Default Admin	✓	✗
Home Visit	HMV	Admin1, Caregiver Limited View, Default Ad...	Admin1, Default Admin	✓	
Human Resources	HR	Default Admin, HR	Default Admin	✓	✗
Other	OTH	Default Admin, HR, Scheduler	Default Admin	✓	✗
Payroll	PAY	Default Admin, HR	Default Admin	✓	✗

Communication Setup



Document Categories

The Document Categories table is used to maintain a list for classifying documents that are uploaded into the system for either Caregivers or Clients. Categorizing documents makes searching for them easier, and Visit Categories are used for document uploads in the CareWhen Mobile App.

Configuration Notes

- When adding or editing document categories, toggle items in the Role table to select roles that can view each document type.

Document Categories

Name ↑	Allowed Roles	Active	
Certifications	Admin1, Caregiver Limited View, Default Admin, HR, Scheduler	✓	
Other	Admin1	✓	
Timesheets	Admin1	✓	✗
Visit	Admin1	✓	

Add Document Category

Name:*

Active

Role (check to enable)	Read Only
<input checked="" type="checkbox"/> Admin1	<input type="checkbox"/>
<input checked="" type="checkbox"/> Caregiver Limited View	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Default Admin	<input type="checkbox"/>
<input type="checkbox"/> HR	<input type="checkbox"/>
<input type="checkbox"/> Scheduler	<input type="checkbox"/>

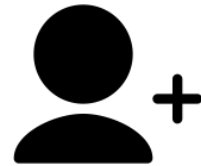
* required

User Management allows you to define user roles for your Agency and create and manage new users

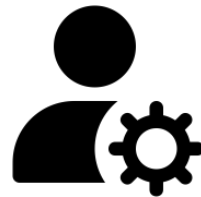
User Management



Configure user roles and permissions



Add new users



Manage users

User Management



Roles

Agencies can customize and create user roles to control what users can do within CareWhen. For example, you may not want a scheduler to view or change client billing information.

Configuration Notes

- “Admin1”, along with any other Roles that have been assigned to users, may not be removed.
- For users that should have access to everything, assign Admin1.
- If a user is unable to perform a specific action, it is often because the role they are in is not set up to allow it.

1 Settings

2 Agency Roles

3 Scheduler

4 Add icon

Click the Add icon to create a new role name, or the Edit icon to edit the name of a role

Role : Features (expand to view)	Enabled	Read Only	Delete
Admin1			
Caregiver Limited View			
Default Admin			
HR			
Scheduler			
Clients	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Document Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Caregivers Add	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Edit/View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Financial	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Personal Info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Private	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Scheduling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Agency Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Caregivers Availability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Photo	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Notes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Compliance	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Caregivers Time Sheets	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers History	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Reimbursement Items	<input type="checkbox"/>	<input type="checkbox"/>	
Caregivers Reimbursement Rates	<input type="checkbox"/>	<input type="checkbox"/>	
Home	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Settings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Tasks	<input type="checkbox"/>	<input type="checkbox"/>	

Expand the role (highlighted in yellow), and then expand the section you would like to edit permissions for (highlighted in green).

Check or un-check boxes on each of the permissions (highlighted in blue).

"Enabled" means that users assigned that role will be able to see and edit the information in that tab. "Read Only" mean that they will be able to view, but not edit, that information.

User Management



Agency Users

You can add and update your users within the Agency Users tab. Each user will be assigned a role when created.

Last Name	First	User N...	Agen...	Is Caregiver	Limit Zone ↑	Active	Last Login Date
Ciotti	Jenna	ACB.J...	Admin1			✓	
Gilbert	Mike	ACB.M...	Admin1			✓	09/17/2019 07:54 AM

Configuration Notes

- This tab will show active users by default. Checking Show Inactive will include inactive users, as well. Additionally, Include Caregivers can be toggled on to display Caregivers in this table.
- Agency administrators can also reset passwords or resend account emails from this tab by editing the user.

Resent new account email

Reset password Active

First Name: Jenna
Last: Ciotti
Email: a.nelson@assuricare.com
Is Caregiver:
User Name: ACB.JennaC
* required

For Active users, their password can be reset or account email resent from the Personal tab. To make an Agency user Inactive, uncheck "Active".

Make User Schedulable Save Save & Close Cancel

User Management



Adding a User

When adding a new user, information such as their name, email, username, birth date, and role are required.

Configuration Notes

- The username will populate automatically based on the name entered.
- Users can be limited to a particular zone if they should only see or edit data relating to clients and caregivers assigned to that zone.

New Agency User

Personal Info Private Agency

First Name:*

Last:*

Email:*

Is Caregiver

User Name:* ACB:

* required

Active

Make User Schedulable Save Save & Close Cancel

New Agency User

Personal Info Private Agency

Birth Date:* Age:

* required 🛡️ read only

The Birth Date will be used in the event of a password reset

Make User Schedulable Save Save & Close Cancel

New Agency User

Personal Info Private Agency

Agency Role:*

Limit By Zone:

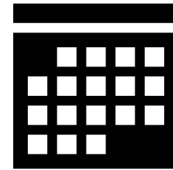
* required 🛡️ read only

Limit By Zone will reveal a selection tab allowing a Zone designation for the User

Make User Schedulable Save Save & Close Cancel

Configure settings pertaining to visit check-in, time tracking, and alerts

Clockwork / EVV Settings



Set scheduling and visit parameters for Caregivers



Add clock-in and clock-out prompts



Manage visit alerts

ClockWork / EVV

Options

Use the Options tab to configure a multitude of settings used for both CareWhen mobile app and ClockWork telephony-based EVV.

These settings largely determine what is logged by Caregivers upon check-in and check-out. Some examples of what can be controlled are outlined in blue.

More information...

- For a detailed breakdown of these options, reference the ClockWork / EVV section of the CareWhen Product Guide.

The screenshot shows the 'Settings' menu with 'Options' selected. The 'ClockWork/EVV' section is expanded to show various configuration options. Callouts provide additional context for several settings:

- Save changes:** A callout points to the Save icon, stating: "Save changes whenever they have been made by clicking the Save icon."
- Agency ID:** A callout points to the ClockWork Id field (10212), stating: "The Agency's pre-set ClockWork ID will be used by Caregivers for Telephony EVV."
- Rounding Rule:** A callout points to the Rounding Rule dropdown (Round Both), stating: "If applicable, set rounding settings that are applied to Caregiver Clock-In's to comply with state-specific billing requirements. 'Round To Duration' will round Clock-In times up. 'Round Duration' will round down. 'Round Both' applies both rules."
- Travel and Mileage:** A callout points to the Use Travel Mileage and Use Travel Time checkboxes, stating: "Toggle and set mileage and travel time options that, if applicable, can factor into Caregiver payroll."
- Tasks:** A callout points to the Use Tasks and Use Refused Tasks checkboxes, stating: "Toggle whether or not Tasks are captured and logged during EVV check-ins."

Other visible settings include: No Caller ID Number, Training Numbers, Use TM At Clock In, Use TT Before TM, Use Errand Mileage, Require Response, Maximum Miles (50), Bill Over At Scheduled (Long Term Care, Medicaid, Private Duty), and Minutes More than 24 Hrs (20).

ClockWork / EVV



Options Continued

Use the Options tab to configure a multitude of settings used for both CareWhen mobile app and ClockWork telephony-based EVV. These settings largely determine what is logged by Caregivers upon check-in and check-out. Some examples of what can be controlled are outlined in blue.

More information...

- For a detailed breakdown of these options, reference the ClockWork / EVV section of the CareWhen Product Guide.

Set the window of time at the end of a daily shift that Caregivers will be able to clock-out early or late.

To allow Caregivers to check-in for non-scheduled visits, ensure that Allow Flexible Scheduling has been checked.

Expand Flex visit Client options for Caregivers by including all Clients in Caregivers zone.

Only allow Flex visits for services that a Client is authorized to receive by insurance.

Bill Over At Scheduled: Developmentally Disabled Mental Illness Serious Mental Illness

Minutes More than 24 Hrs:

Minutes Less than 24 Hrs:

Message Voice:

Message Volume:

Restrict Tasks to only those in Care Plan:

Include warning message at Clockout when No Tasks:

Enable Document Capture:

No Clockout without Required Task:

Require comments on Refused Tasks Only:

Require comments on All Tasks:

Allow Flexible Scheduling:

Use associated Zones for Flexible Scheduling:

Restrict Flexible Visits to authorized services:

No start with existing incomplete visit:

Enable clock-in from alternate address:

Enable clock-out from any address:

If an alternate address is setup for a Client, allow for EVV clock-in from that address.

Additionally, allow for clock-out from any address in the event that an order changes location mid-visit.

Note: These options may not be acceptable by certain state EVV regulations.

ClockWork / EVV



Exclusions

Use the Exclusions tab to omit users from utilizing CareWhen / ClockWork EVV.

These users will remain present in the system but will be unable to check-in or check-out using the mobile app or telephony systems.

For Example...

- If utilizing a placeholder Client such as “Office Meeting” or “Travel Time”

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Opt 3 Exclusions Prompts Facilities Late Alerts Upcoming

Exclude Caregivers: Exclude the following Caregiv...
No Caregiver selected. Click Add button.

Exclude Clients: Exclude the following Clients ↑
No Client selected. Click Add button.

* required read only

ClockWork / EVV

Prompts

Use the Prompts tab to edit, sample, download, or reset automated voice prompts that Caregivers will respond to when clocking in or out.

Configuration Note

- Consult with AssuriCare before making changes to Prompts

Click the Play icon to sample the message. You may also download an MP3 of the message, or reset it to its CareWhen default.

Description	Message	Play	Download	Reset
Greeting/Caregiver ID	Please enter your employee ID followed by the pound sign.			
Incorrect Caregiver ID	Incorrect employee ID, please try again.			
Facility account ID	Please enter the facility account ID followed by the pound sign.			
Incorrect facility account ID	Incorrect facility account ID, please try again.			
Caller ID is unavailable	Caller ID is unavailable or blocked. Please hangup and redial using star 8 2...			
Replay Current Option	Press the star key to replay your current option.			
Last 4 Digits of SSN	Enter the last 4 digits of your Social Security Number without the pound sign.			
Starting or Stopping	Enter 1 to start a visit. Enter 2 to end a visit. Enter 3 to leave a voice messa...			
Voice Message	You have voice mail. Enter 4 to play your message. Enter 5 to play it later.			
Voice Message Options	Enter 7 to save the message. Enter 8 to delete the message. Enter 9 to rep...			
Starting or Stopping	Enter 1 to start a visit. Enter 2 to end a visit.			
Thank You	Thank you and have a nice day			

Double click on a the Message field to make edits to the script.

ClockWork / EVV



Facilities

If multiple clients are based in a single care facility and share a single contact number, or if multiple clients are based in a single residence, use the Facilities tab to organize the applicable clients under a common Facility and phone number.

1 Settings

2 ClockWork/EVV

3 Facilities

Add Facilities, add applicable phone numbers, and associate Clients with each Facility.

Facility: Test Facility

Facility Phone Numbers		Facility Clients	
Add Phone Number		Select Client	
Phone Number		Client Name ↑	Facility ID
(111) 222-3333	✖	Andrews, Abigail	10

When checking in via ClockWork Telephony for a client associated with a facility, a Caregiver will use the facility phone number, followed by the Client ID, to specify which Client at the facility is being visited.

Note: This is not applicable to the CareWhen Mobile App

ClockWork / EVV



Late Alerts

The Late Alerts tab can be used to configure alerts that are sent out to Client Contacts in the event of a late Caregiver arrival. Additionally, Caregiver late alerts can be toggled to notify the Caregiver of a late start time.

Configuration Note

- For late alerts to be sent out via email, Client Contacts or Caregivers must have email addresses on file.
- Clients or Caregivers “Excluded” from EVV will not receive late alerts.

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Options Exclusions Prompts Facilities Late Alerts

Late Alerts Options Notify Schedule

Alerts Enabled:

Alert Delay:

Caregiver Alerts Enabled:

Caregiver Alert Delay: 10

Family Member Alert Enabled:

Default Email Address:

Reply To Email Address:

Family Member Alert Delay: 10

Email Subject Line:

Limit Alerts By Zones:

Max Alerts per text:

Checking to enable Family Member alerts will reveal the check-boxes for Late Alerts under a Client Contact's settings.

Late Alert Email: Late Alert Text:

Options Exclusions Prompts Facilities Late Alerts Upcoming Alerts Electronic Signature

Late Alerts Options 1 Notify Schedule

2

From	To	Begins ↑	Ends	Method	Send Address	Recurrence
No Late Alerts Email entries found.						

3

Add New Email schedule

Start: 10/13/2020 08:00 AM

End: 10/13/2020 05:00 PM

Notify Method:

Email Address:

Recurrence

Add Cancel

Use the Notify Schedule sub-tab to establish windows of time during off-hours for Late Alerts to be sent to an agency via a specific phone number or email address.

ClockWork / EVV



Upcoming Alerts

Use the Upcoming Alerts tab to enable Caregiver alerts that are sent out as a reminder before a visit's scheduled start time. The amount of time before a visit that the alert is sent out can be altered.

The screenshot shows the AssuriCare ClockWork/EVV settings interface. The top navigation bar includes Home, Scheduler, Clients, Caregivers, Reports, Tasks, Messages, Settings (1), and Help. The left sidebar lists various settings categories, with ClockWork/EVV (2) selected. The sub-navigation bar for ClockWork/EVV includes Options, Exclusions, Prompts, Facilities, Late (3), Upcoming Alerts (3), and Electronic. The main content area shows the 'Upcoming Alerts' settings, which are highlighted with a red box. The 'Enable Upcoming Alerts' checkbox is checked (4), and the 'Alert Advance Minutes' is set to 15. A purple callout box contains the text: "Enable Upcoming Alerts to send upcoming schedule alerts to Caregivers a set amount of time before the appointment."

ClockWork / EVV



Electronic Signature

Electronic Signatures used for sign-off following a visit can be toggled from the Electronic Signature tab. Additionally, use this tab to toggle the GPS Validation setting to allow for enabling or disabling GPS validation on a per-Caregiver basis.

Configuration Note

- GPS Validation requires that both Signature Capture options be turned on

CareWhen? **AssuriCare**
The Verification Company

Home Scheduler Clients Caregivers Reports Tasks Messages **Settings** Help

Agency Settings

Toggle options requiring Client or Caregiver sign-off after a visit is complete.

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Options Exclusions Prompts Facilities Late Alerts Upcoming Alerts **Electronic Signature**

Disable GPS Validation:

Client Signature Capture:

Caregiver Signature Capture:

* required 📁 read only

When un-checked, the Agency will have the option to enable or disable GPS validation on a per-Caregiver basis from the Agency tab in a Caregivers record.

This should only be used when a Client is in a remote location without access to a reliable GPS signal, or when Clients are being provided services outside of their home location.

Note: If GPS Validation is enabled, Signature Capture must also be enabled.